NEC Desktop Suite User Guide

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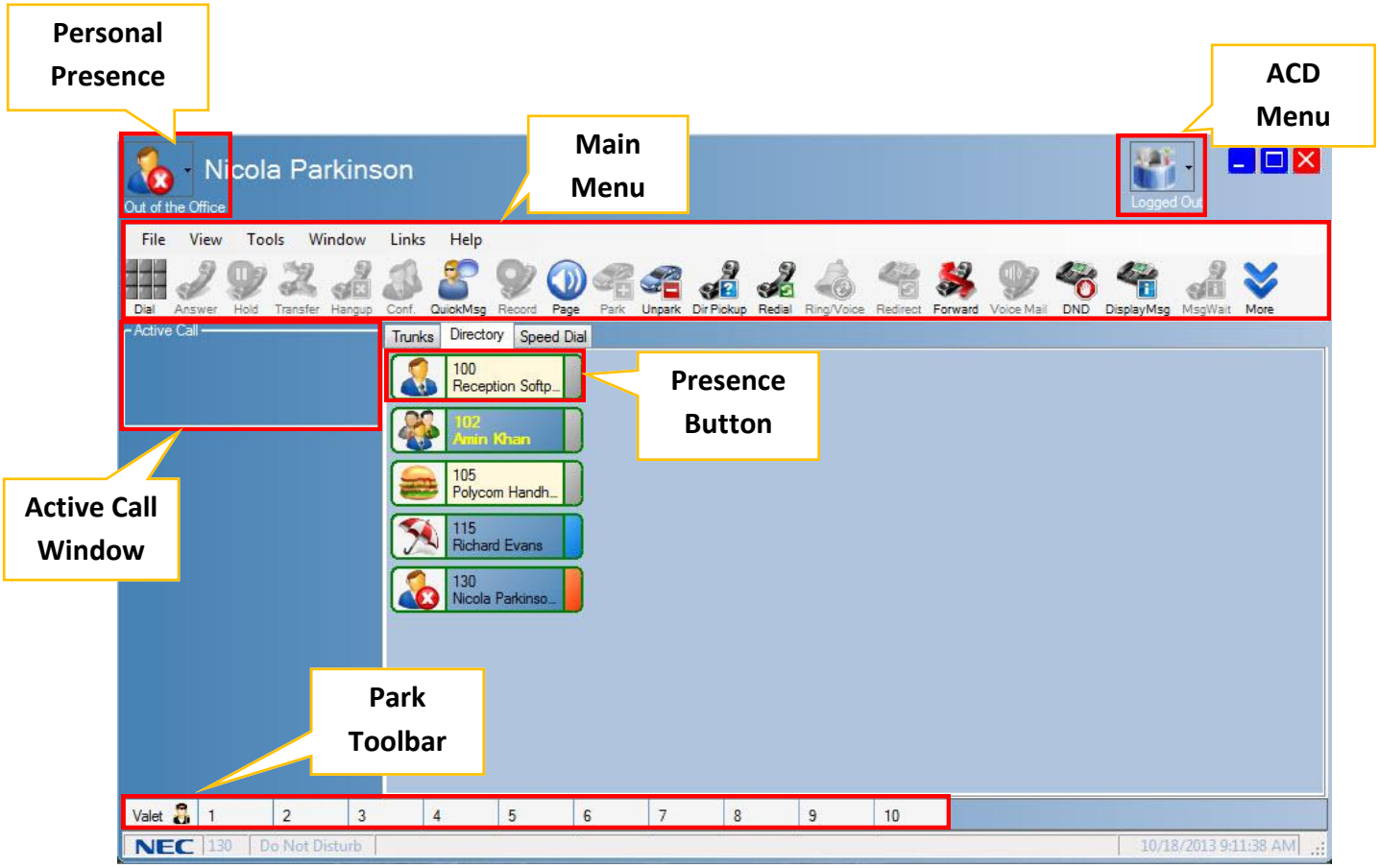
Desktop Screen Overview


Personal Presence
ACD Menu
Main Menu
Nicola Parkinson
Out of the Office
Logged Out
File View Tools Window Links Help
Dial Answer Hold Transfer Hangup Conf. QuickMsg Record Page Park Unpark Dir Pickup Redial Ring/Voice Redirect Forward Voice Mail DND DisplayMsg MsgWait More
Active Call
Trunks Directory Speed Dial
100 Reception Softp...
102 Amin Khan
105 Polycom Handh...
115 Richard Evans
130 Nicola Parkinso...
Presence Button
Active Call Window
Park Toolbar
Valet 1 2 3 4 5 6 7 8 9 10
NEC 130 Do Not Disturb
10/18/2013 9:11:38 AM

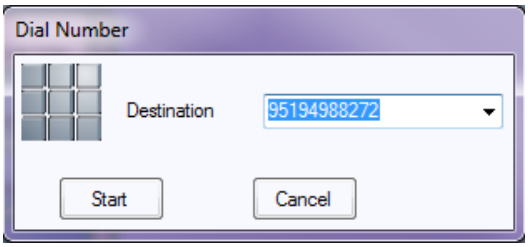
Presence States and BLF Colour Descriptions

Make a Call

You can make a phone call right from the Desktop Suite using the **Dial** button on the main tool bar.

1. Press the **Dial** button on the tool bar

2. Enter the number you would like to dial in the **Destination Field**



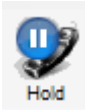
3. Press the **Start** button to initiate the call

Put a Call on Hold

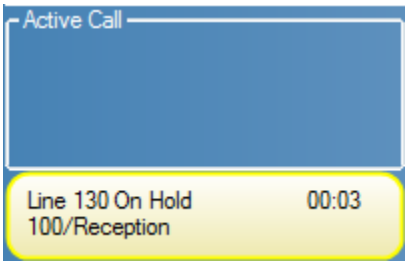
Once you have a call in your **Active Call Window** you can use the **Hold** button on the main toolbar to place your caller on hold.

1. Ensure you have a live call in your **Active Call Window**, as seen below. Active calls have a **Green** border

2. Press the **Hold** button on the tool bar



3. The call will drop below **the Active Call Window** and have a **Yellow** border. This indicates the caller is on Hold

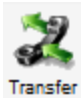


4. To retrieve the held call simply **Double Click** on it

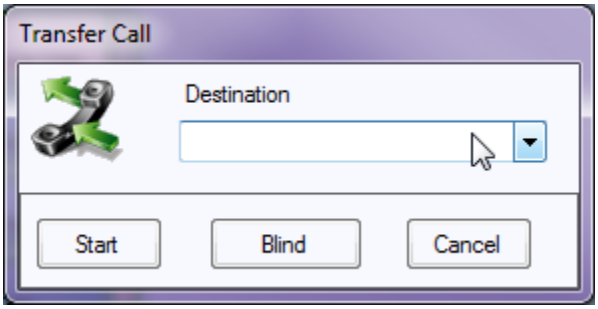
Call Transfer

Initiate transfers in the desktop suite using the **Transfer** button the tool bar

1. While on an active call press the **Transfer** button on the toolbar

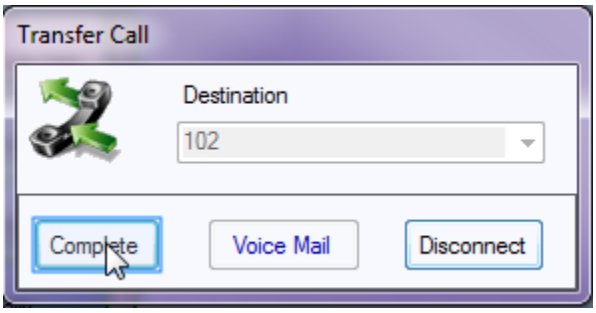


2. Enter the extension or phone number you would like to transfer in the **Destination Field**



3. Next you have 2 options. Press **Start** to begin a **Supervised Transfer**- this allows you to talk to the person you are transferring too prior to putting the call through. Alternately press **Blind** to complete a **Blind Transfer**- this is where the call is taken directly from you and rings to the person you are transferring too. If you select **Blind** your transfer is complete and you do not need step 4.

4. Once you have the person you are transferring to on the line press the **Complete** button to complete your transfer. If the person does not pick up you have the option to press **Voicemail** to put the caller directly into their voicemail instead.



Call Park

There are 2 ways to **Park** an active call using the Desktop Suite.

1. With an active call press the **Park** button on the toolbar and enter a **Park Location**

OR

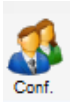
2. Press the **Valet** button at the bottom of the desktop window and the **Race Car Icon** will move to the **Park Location** for you.

Conference Calling

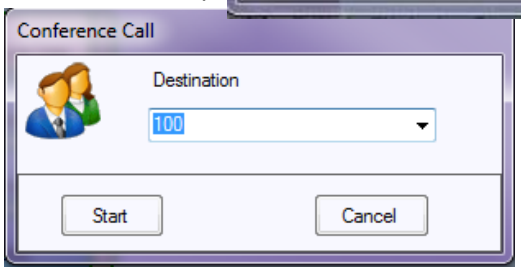
Using the **Conf** button on the toolbar you can achieve three way calls.

1. First you need to connect with the first caller. **Dial** their number or press their **Presence Button** to get them on the

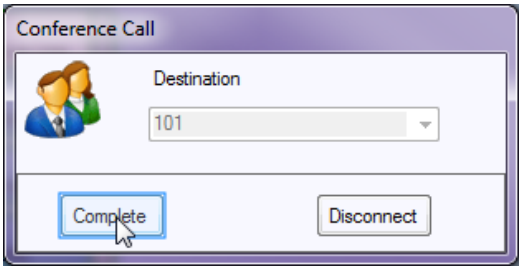
2. Next, press the **Con**



3. In the **Destination** ould like to join the conference then pr



4. Your first caller will be put on hold while you speak with the second caller. Press Complete to join the 2 calls together or press Disconnect if the second person declines the conference.

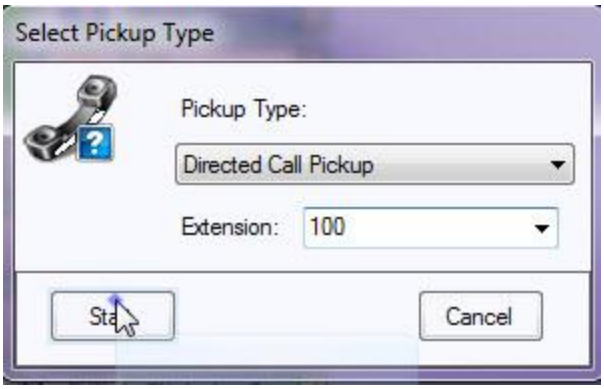


Directed Call Pickup

Use the Desktop Suite to answer another phone in the office that is ringing without leaving your desk.

1. From the Toolbar press the **Dir.Pickup** button

2. Enter the **Extension** you would like to pick up

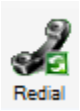


3. Press **Start**

Last Number Redial

Dialing the last number you dialed is easy using the toolbar

1. Press the **Redial** button on the toolbar



2. You will be connected to your previously dialed number

Presence, Call Forwarding and DND

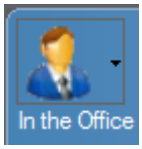
Presence

Your **Presence Status** appears to all other users with the Desktop Suite on your **Presence Button**. This allows your colleagues to see where you are, when you're due back and notes on how to reach you of necessary.

Setting Your Presence

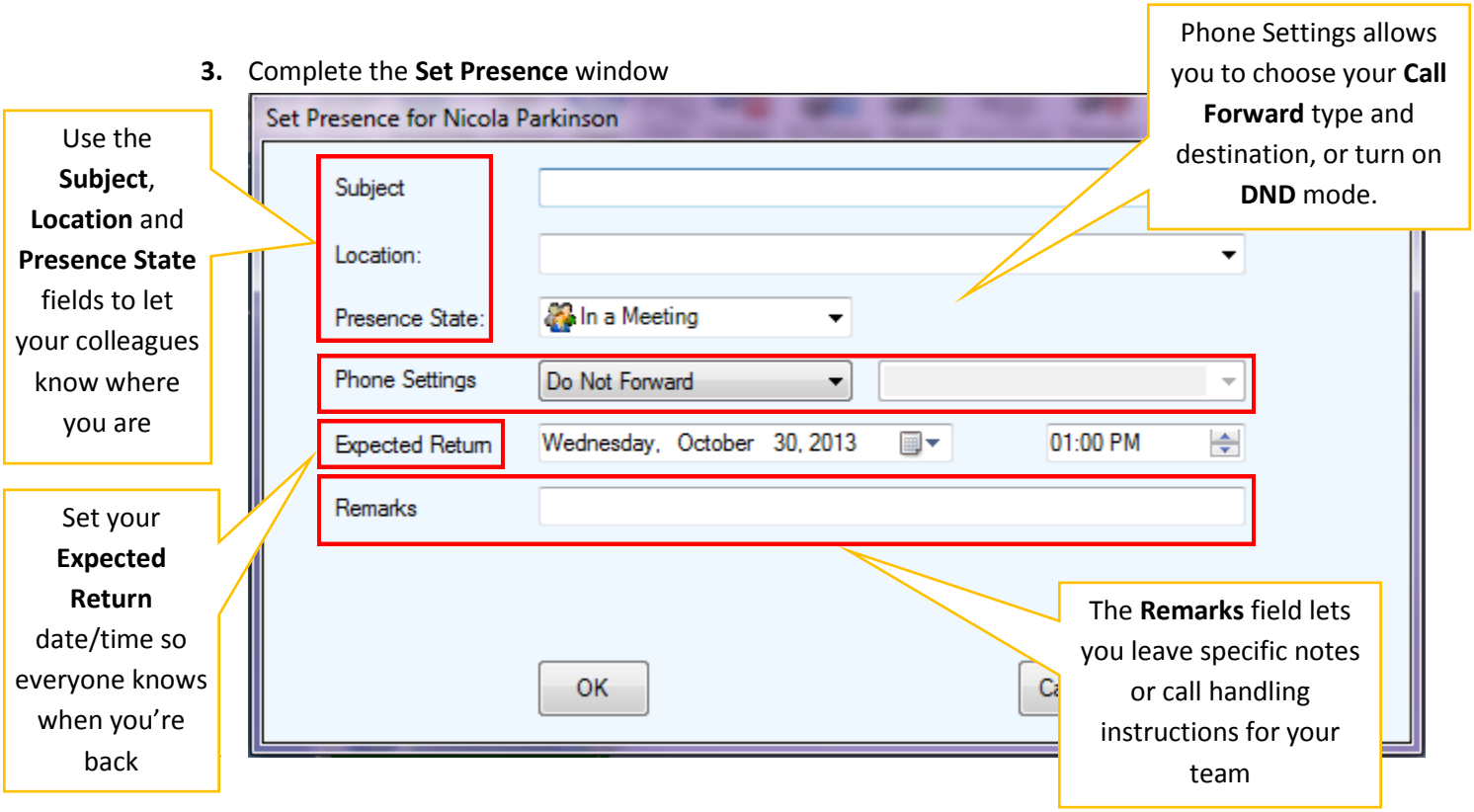
While you're setting up your **Presence Status**, the desktop suite allows you to update your **Call Forwarding** or **DND Status** as well, saving you a step.

1. Click the Presence Dropdown at the top of the desktop screen



2. Select your desired **Presence Status**. Some examples are: **In a Meeting**, **On Vacation** or **Out of the Office**.

3. Complete the **Set Presence** window


Use the **Subject**, **Location** and **Presence State** fields to let your colleagues know where you are
Phone Settings allows you to choose your **Call Forward** type and destination, or turn on **DND** mode.
Set your **Expected Return** date/time so everyone knows when you're back
The **Remarks** field lets you leave specific notes or call handling instructions for your team
Set Presence for Nicola Parkinson
Subject
Location:
Presence State:
In a Meeting
Phone Settings
Do Not Forward
Expected Return
Wednesday, October 30, 2013
01:00 PM
Remarks
OK

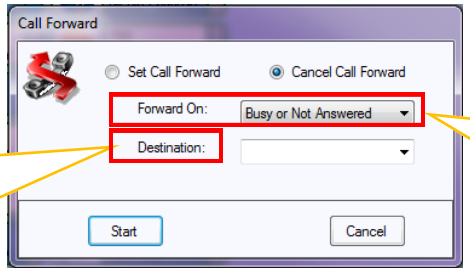
Call Forwarding

There may be times you wish to set up a **Call Forward** without changing your **Presence Status**.

1. Press **the Forward** button the toolbar

2. Select **Set Call Forward**

Enter an extension number or the outside number you would like to forward to in the **Destination** field



Use the **Forward On** dropdown to select when you would like your **Call Forward** to be active.

These options include **Immediate** call forwarding and **Both Ring**, as well as others.

3. Complete the remaining fields as noted above, then click **Start**

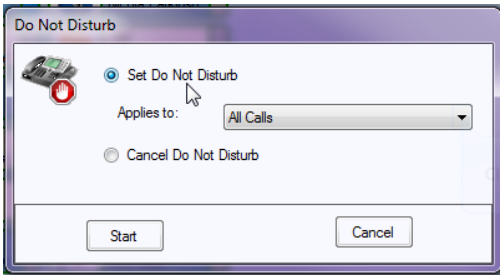
Note: To cancel your Call Forward simply press the Forward button on the toolbar and select Cancel Call Forward

DND

Do Not Disturb takes your calls and points them directly to voicemail without ringing your phone.

1. Press the **DND** button on the toolbar

2. Select **Set Do Not Disturb** and using the dropdown what types of calls you would like the **DND** to apply to (internal, external, all, etc)



3. Press **Start**

Note: To cancel DND press the DND button on the toolbar and select Cancel Do Not Disturb

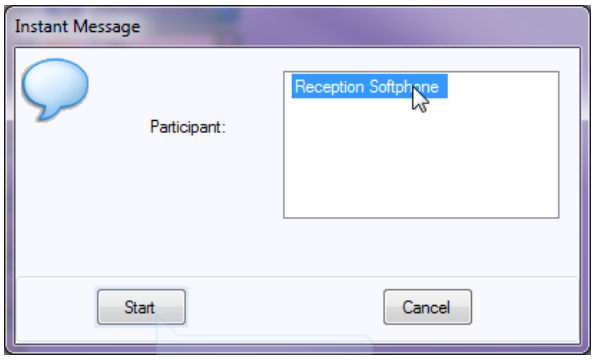
Chat and Messaging Functions

Instant Messaging

The **Instant Message** feature of the desktop suite allows you to have an ongoing text based conversation with another user logged into Desktop. A user's name will be highlighted in **Yellow** on their **Presence Button** when they are logged in and available to IM.

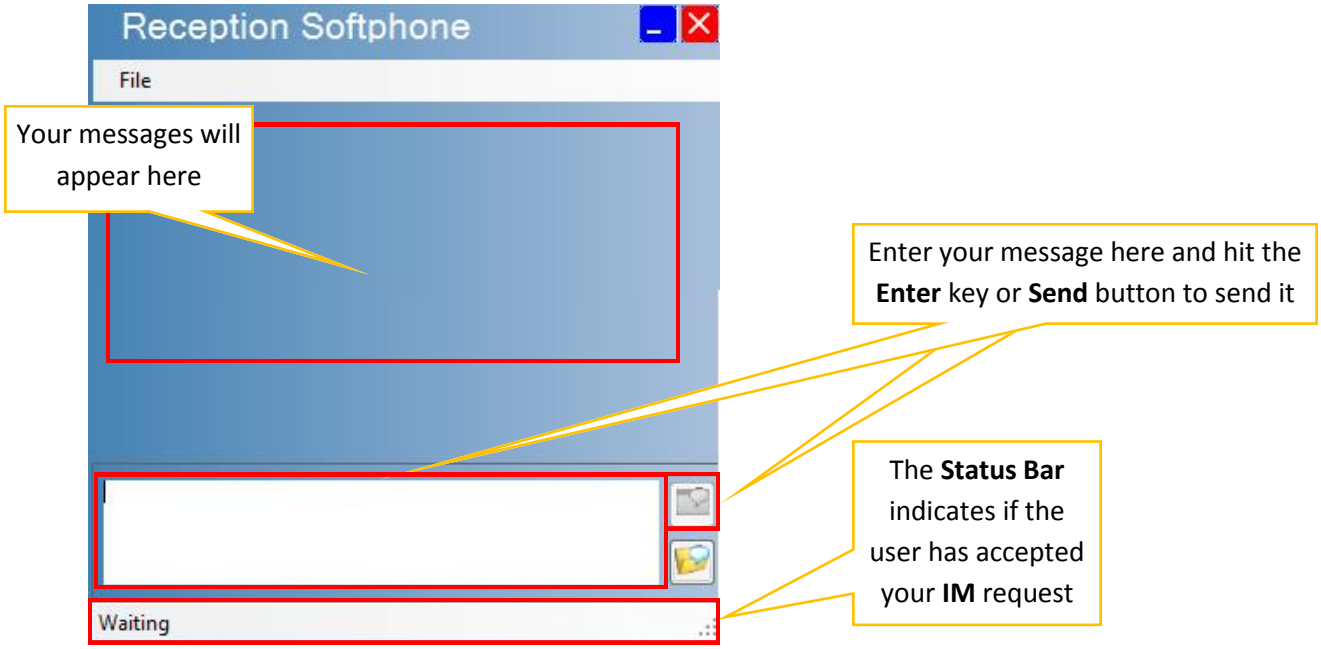
1. Press the IM button the toolbar

2. Select the user you would like to **IM** from the **Participant** window. **Note: Only users logged in to Desktop will appear on this list.**



3. Press the Start button to begin the Instant Message

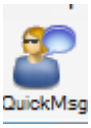
4. The instant Message Window opens


Reception Softphone
File
Your messages will appear here
Enter your message here and hit the **Enter** key or **Send** button to send it
The **Status Bar** indicates if the user has accepted your **IM** request
Waiting

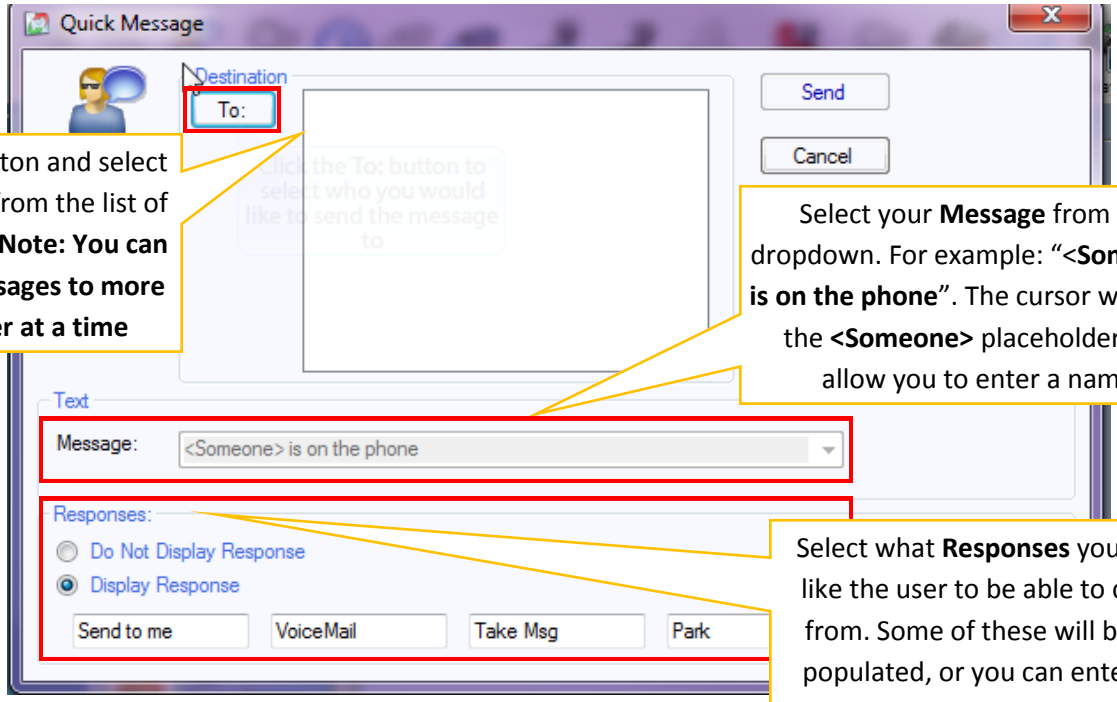
Quick Message

The Quick Message feature allows you to send a logged in user a quick predetermined message with built in response options for common place items such as their meeting arriving, or a call waiting.

1. Click the Quick Msg button on the toolbar



2. The Quick Message window opens

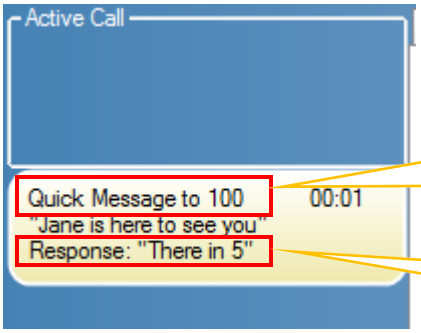


Click the **To:** button and select your recipients from the list of users logged in. **Note: You can send quick messages to more than one user at a time**

Select your **Message** from the dropdown. For example: "**<Someone> is on the phone**". The cursor will go to the **<Someone>** placeholder and allow you to enter a name

Select what **Responses** you would like the user to be able to choose from. Some of these will be auto populated, or you can enter your own.

3. Hit the Send button to send your message
4. The quick message appears under your Active Call window. If you send the message to multiple users a Quick Message Bubble will appear for each extension.
5.

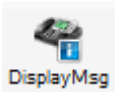


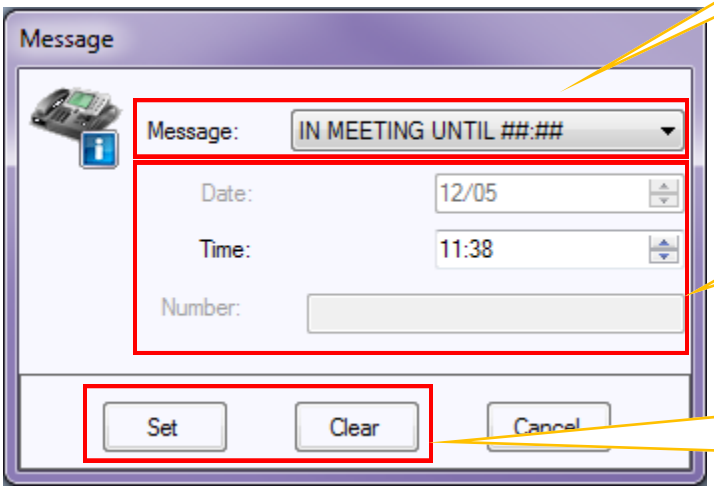
Each **Quick Message Bubble** indicates the extension the message is for.

The **Response:** field will populate when the user selects one of the response options you provided

Display Message

The **Display Message** option allows you to program a preset greeting to appear on the screen of your phone when you're away from your desk, giving details to anyone looking for you at your desk.

1. Press the **Display Msg** button on the toolbar
2. 

3. The **Display Message** window opens
4. 

Use the dropdown to select the **Message** you would like to display

Use the **Date**, **Time** and **Number** fields to fill in any blanks in your chosen message.

Press the **Set** button to complete, or if you already have a **Display Message** set up press **Clear** to clear it.

Your **Display Message** displays on the phone until you

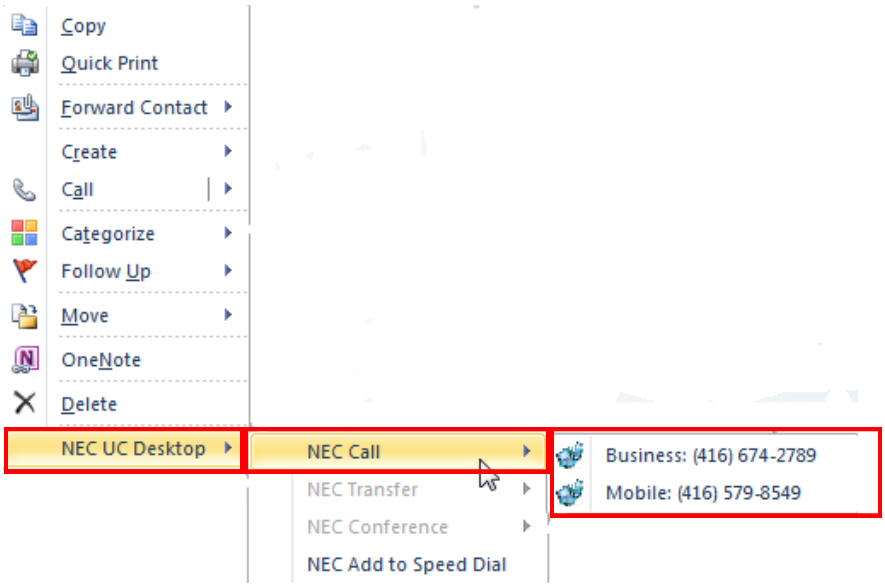
Dialing from Outlook and Transferring to Outlook Contacts

There are 3 ways to dial from outlook. **Methods 1 and 2 also work for transferring calls to contacts if you have already connected to a call.**

Method 1: Right Click

1. From the **Contacts** page in outlook **Right Click** on the contact you would like to dial

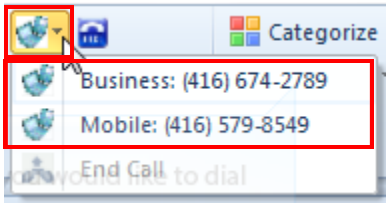
2. From the dropdown select **NEC UC Desktop** then **NEC Call** and chose the number you would like to dial



Method 2: Outlook Toolbar

1. From the **Contacts** page in outlook select the contact you would like to dial with a single Left Click

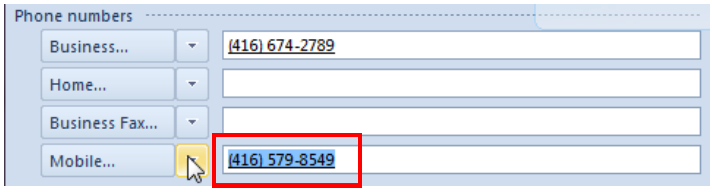
2. From the **Toolbar** use the **Dial** dropdown and select the number you would like to dial



Method 3: Highlight-To-Dial

1. **Double click** on the **Contact** in Outlook to open it

2. **Highlight** the phone number you would like to dial



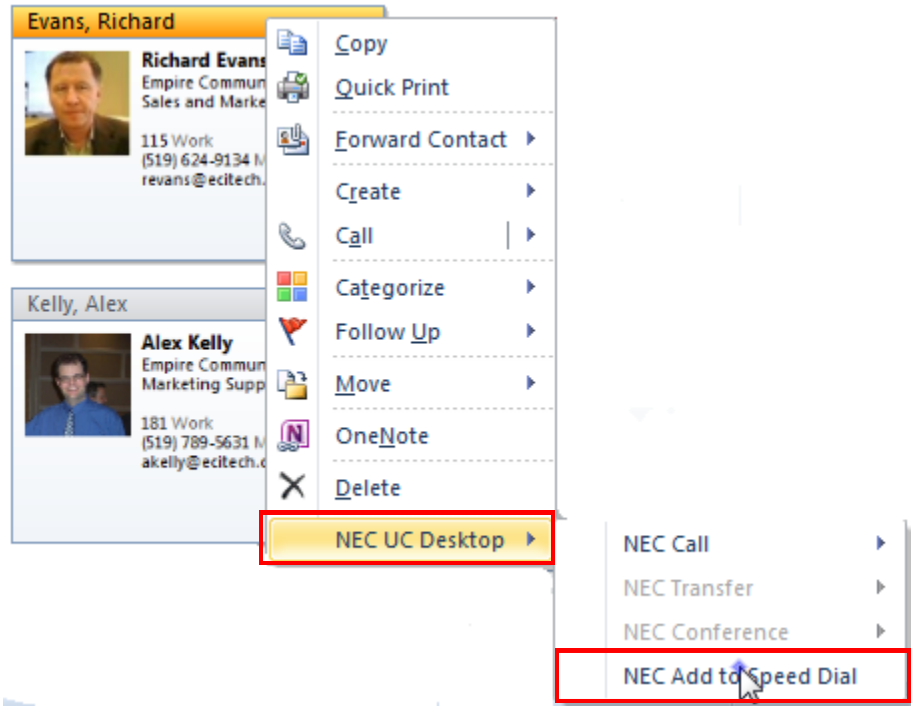
3. Press your **Highlight Dial Shortcut** (default is **CTRL+F1**)

Note: You can update your **Highlight Dial Shortcut** in Desktop- see section Desktop Customization for more details.

Creating Speed Dials from Outlook Contacts

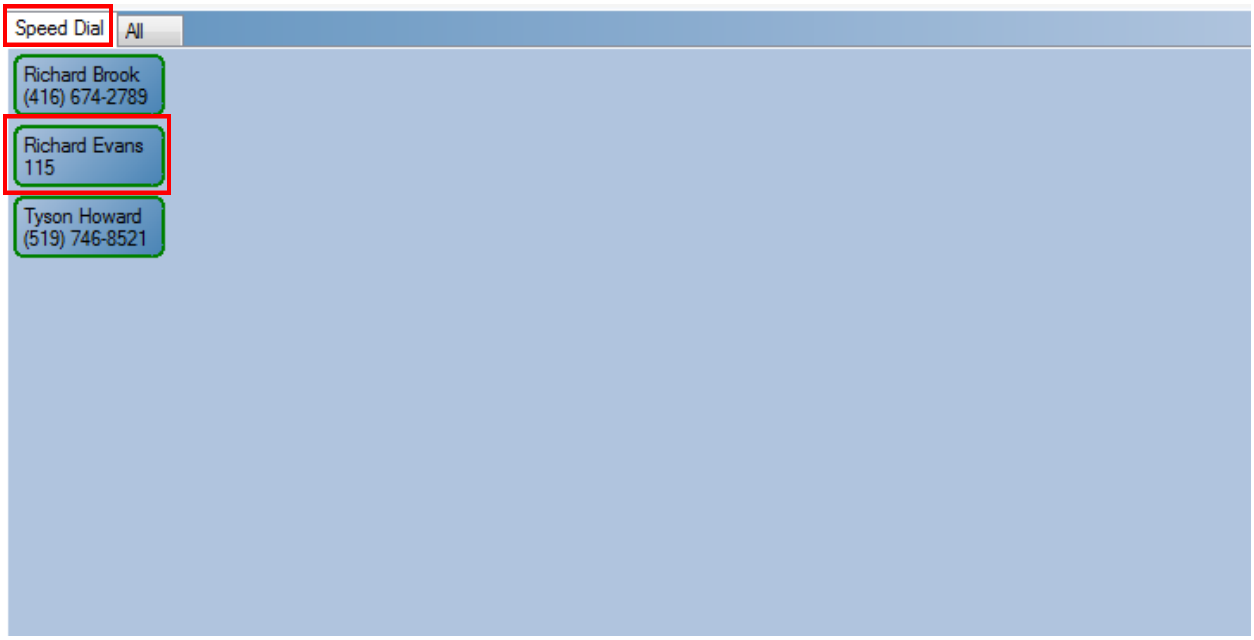
You can add Speed Dials to your UC Desktop window using your outlook contacts. These speed dials appear on a Speed Dial tab located next to your BLF Tab.

1. From the Contacts page in Outlook Right Click on the contact you would like to add to Speed Dial



2. Select NEC UC Desktop from the drop down

3. Click NEC Add to Speed Dial
4. The contact is now added to your speed dial tab



Highlight Dial

Highlight Dial works with many types of documents such as web pages, spreadsheets and CRM applications.

1. Highlight the number you would like to dial
2. Press your **Highlight Dial Shortcut** (default is **CTRL+F1**)

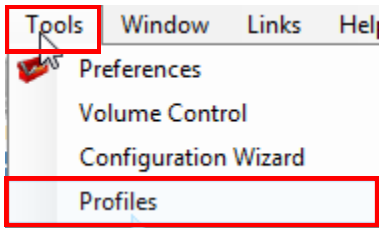
Note: You can update your **Highlight Dial Shortcut** in Desktop- see section Desktop Customization for more details.

Saving Profiles

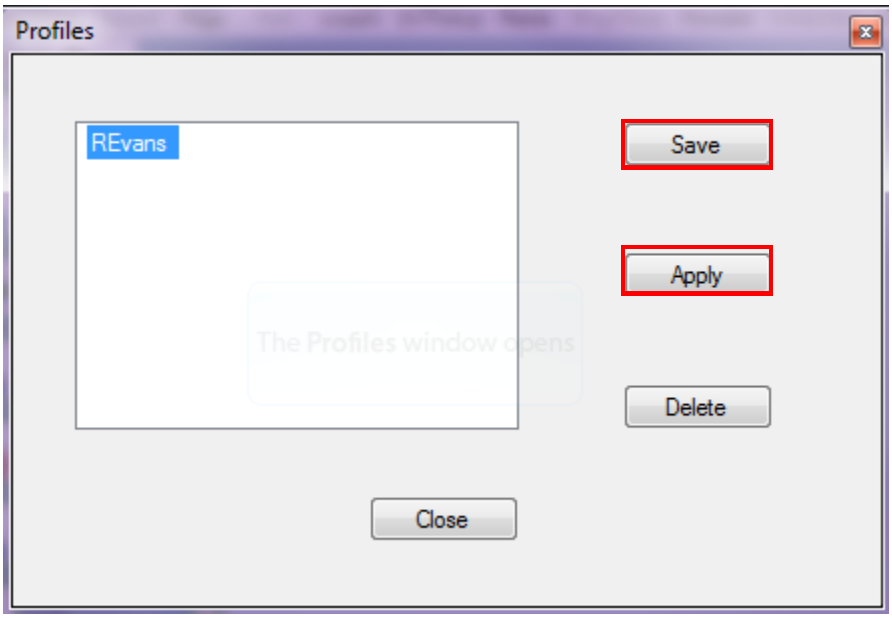
Before you begin changing settings save a base profile you can revert to in case of trouble.

1. Select Tools from the Toolbar

2. Select Profiles



3. The Profiles window opens



4. Click the Save button and name your profile.

Note: All users can see these profiles so use something unique to you to name your profile

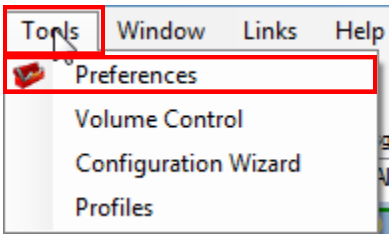
5. To apply the profile in the future simply select it from the list and click the Apply button

Accessing the Preferences Menu

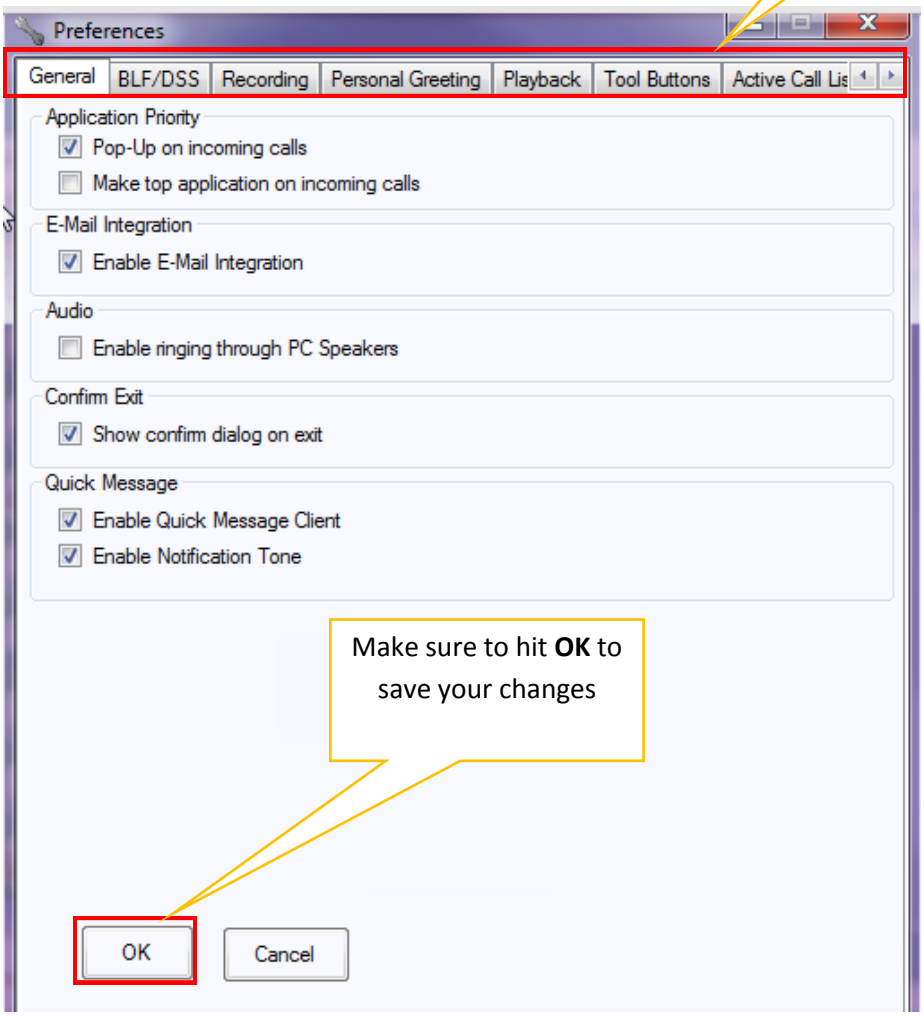
The Preference menu is where all your customization options reside in the Desktop suite. All following customization options require you to first access this menu.

1. Click the Tools button

2. Select Preference

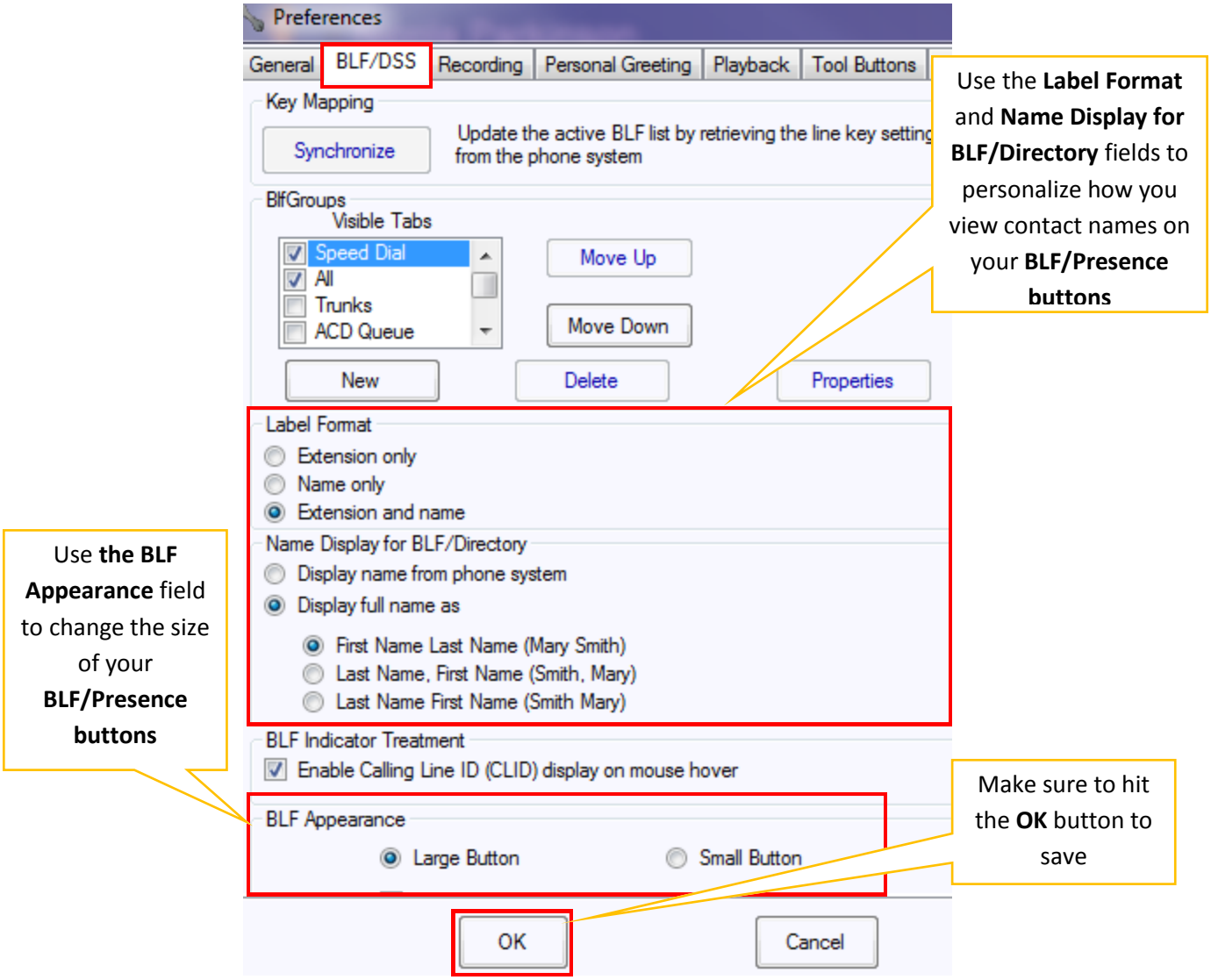
3. 

4. The Preferences window opens

5. 

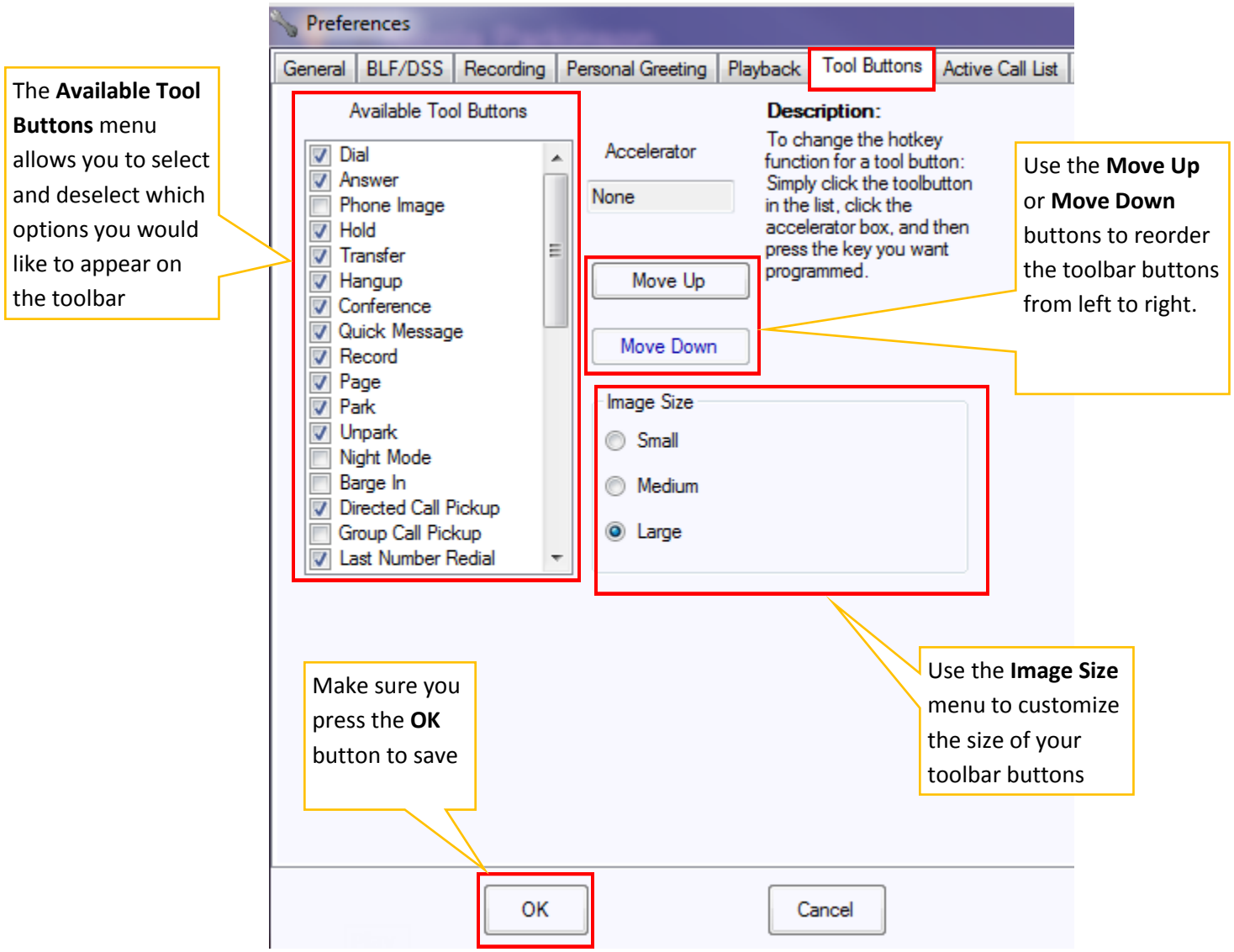
Customizing the BLF/Presence Buttons

You can customize details on your **BLF/Presence buttons** by accessing the **Preference Menu** and selecting the **BLF/DSS tab**



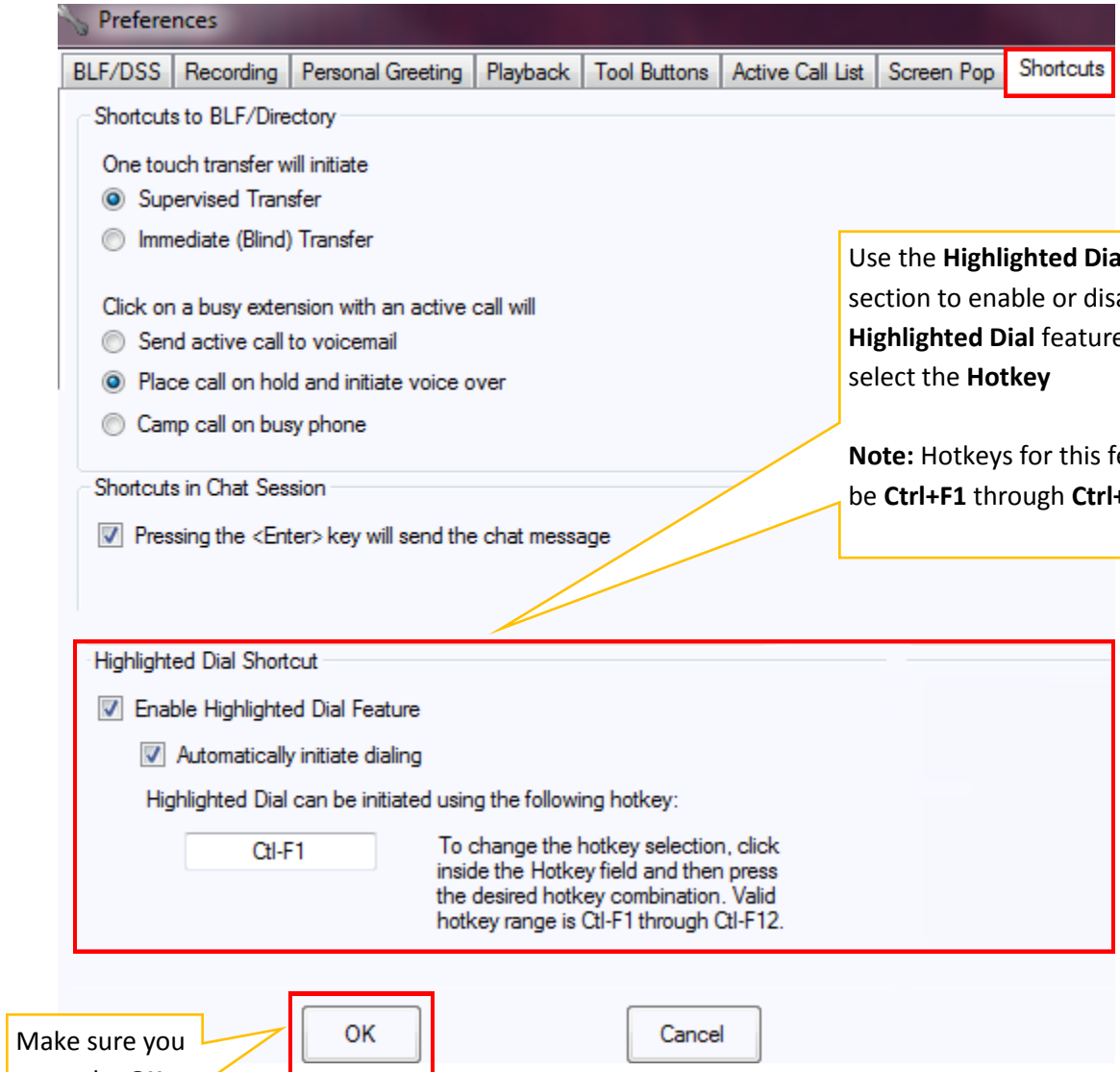
Customizing the Toolbar

The **Tool Button tab** in the **Preferences** menu allows you to add and remove buttons from your toolbar, re order them and select icon size.



Highlight Dial Hotkey Setup

From the Shortcuts menu you can


Preferences
BLF/DSS
Recording
Personal Greeting
Playback
Tool Buttons
Active Call List
Screen Pop
Shortcuts
Shortcuts to BLF/Directory
One touch transfer will initiate
Supervised Transfer
Immediate (Blind) Transfer
Click on a busy extension with an active call will
Send active call to voicemail
Place call on hold and initiate voice over
Camp call on busy phone
Shortcuts in Chat Session
Pressing the <Enter> key will send the chat message
Highlighted Dial Shortcut
Enable Highlighted Dial Feature
Automatically initiate dialing
Highlighted Dial can be initiated using the following hotkey:
Ctl-F1
To change the hotkey selection, click inside the Hotkey field and then press the desired hotkey combination. Valid hotkey range is Ctl-F1 through Ctl-F12.
OK
Cancel

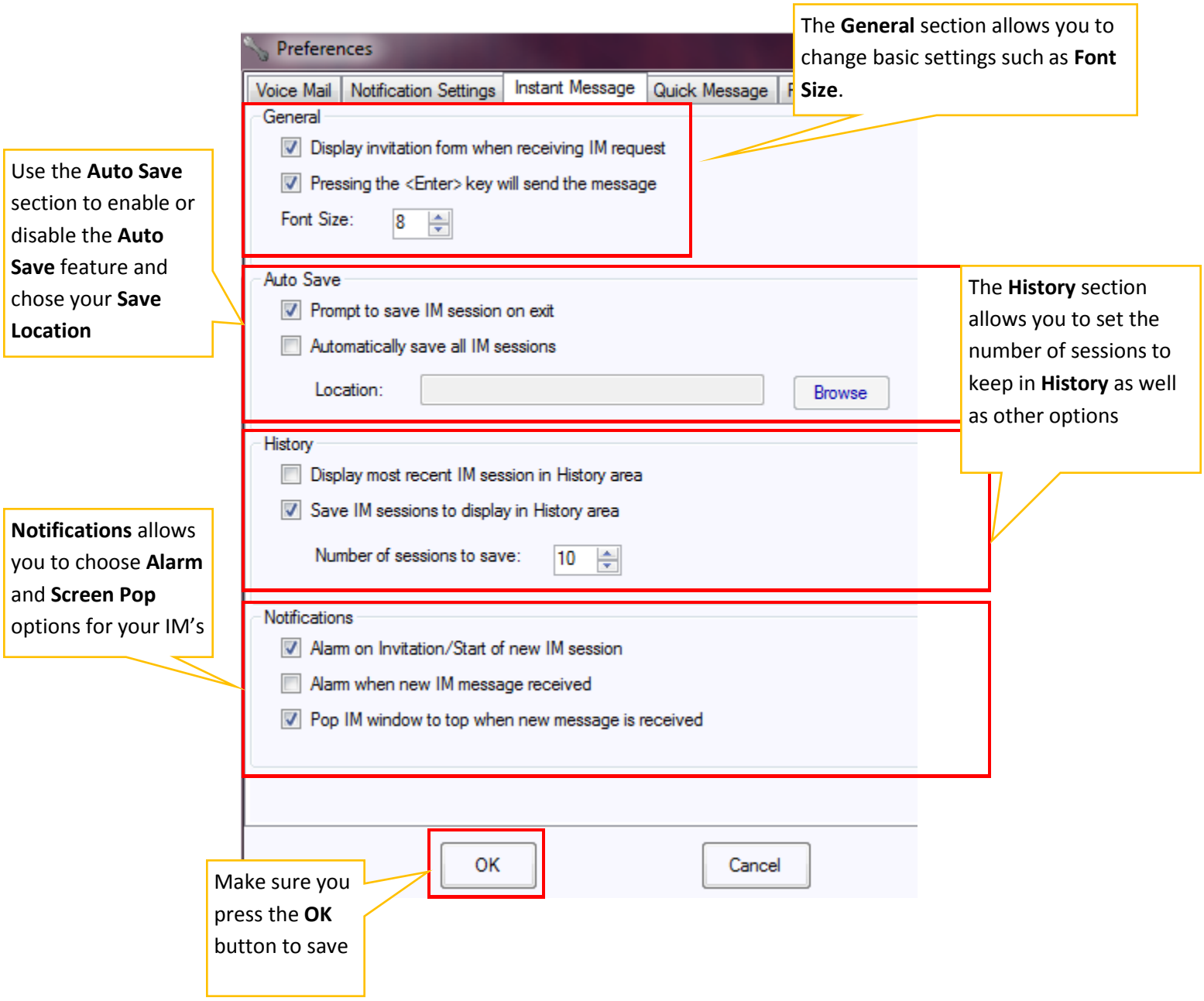
Use the **Highlighted Dial Shortcut** section to enable or disable the **Highlighted Dial** feature as well as select the **Hotkey**

Note: Hotkeys for this feature can be **Ctrl+F1** through **Ctrl+F12**

Make sure you press the **OK** button to save

Instant Messaging Settings

Access the Instant Messaging tab to make change to your IM preferences

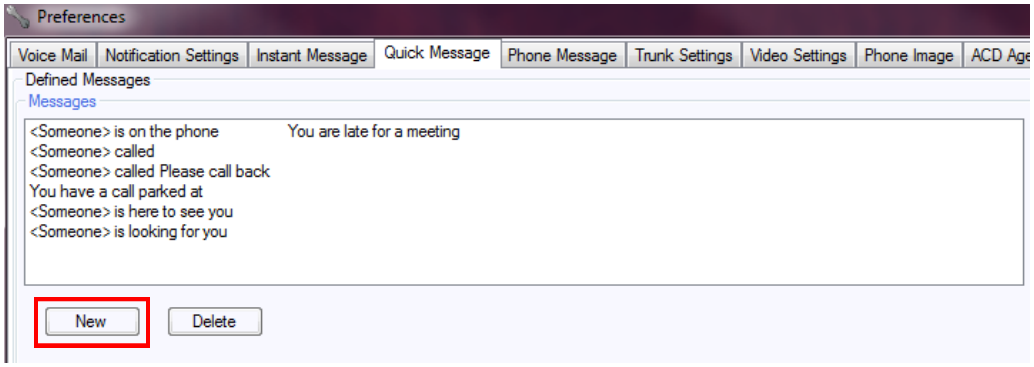

The **General** section allows you to change basic settings such as **Font Size**.
Use the **Auto Save** section to enable or disable the **Auto Save** feature and chose your **Save Location**
The **History** section allows you to set the number of sessions to keep in **History** as well as other options
Notifications allows you to choose **Alarm** and **Screen Pop** options for your IM's
Make sure you press the **OK** button to save
Preferences
Voice Mail
Notification Settings
Instant Message
Quick Message
General
Display invitation form when receiving IM request
Pressing the <Enter> key will send the message
Font Size:
8
Auto Save
Prompt to save IM session on exit
Automatically save all IM sessions
Location:
Browse
History
Display most recent IM session in History area
Save IM sessions to display in History area
Number of sessions to save:
10
Notifications
Alarm on Invitation/Start of new IM session
Alarm when new IM message received
Pop IM window to top when new message is received
OK
Cancel

Customizing Quick Messages

In the **Quick Message** tab you can set up new **Quick Messages** as well as new **Responses**.

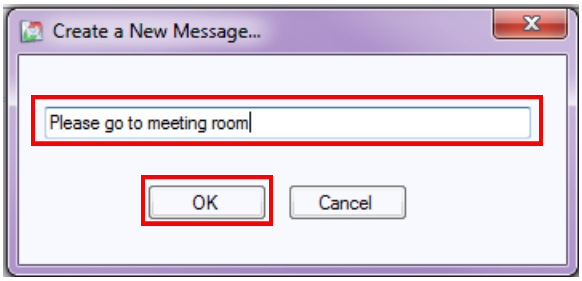
Setting up new Quick Messages:

1. Press the **New** button below the **Defined Messages** section



2. The **Create a New Message** window opens

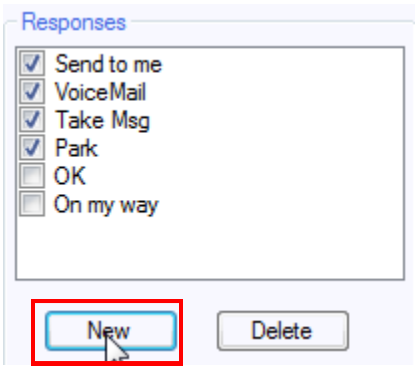
3. Enter your **Message** and press the **OK** button



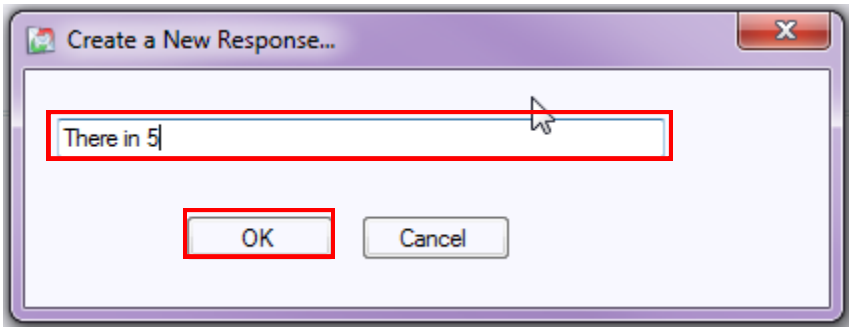
4. On the right of the screen check off the corresponding **Responses** or add a **New Response** using the below steps

Setting up new Responses:

1. Press the **New** button below the **Responses** section



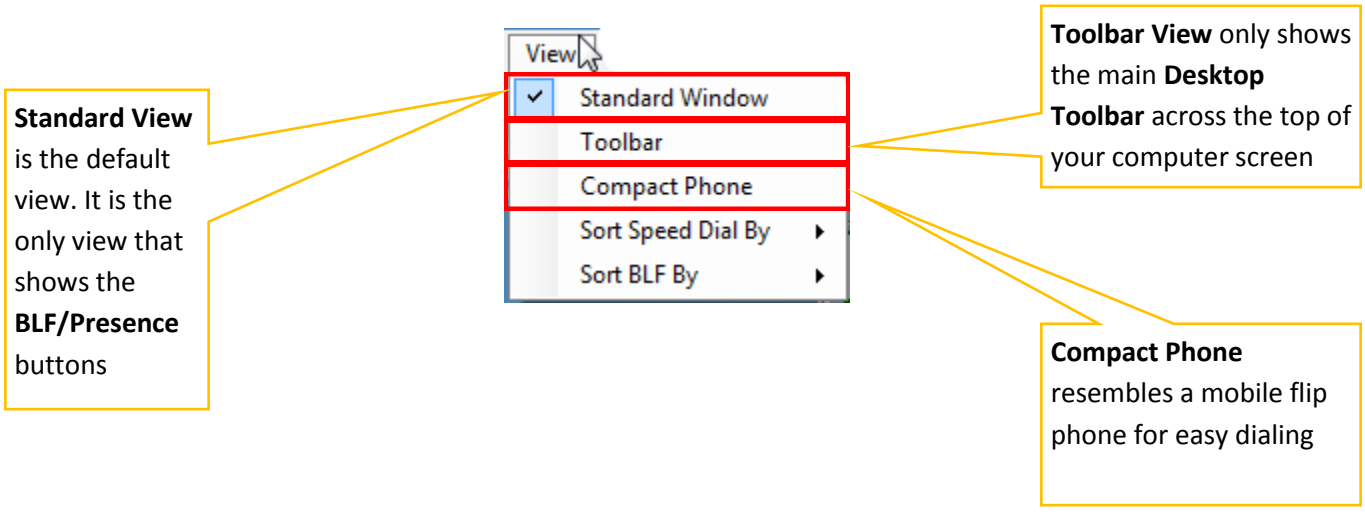
2. The **Create a New Response** window opens
3. Enter your **Response** and press the **OK** button



Toggling Between Views

From the main toolbar you can select different modes to view the Desktop suite.

1. Press the View button on the toolbar
2. Select the mode you would like to activate. Mode descriptions are listed below


View
Standard Window
Toolbar
Compact Phone
Sort Speed Dial By
Sort BLF By
Standard View is the default view. It is the only view that shows the **BLF/Presence** buttons
Toolbar View only shows the main **Desktop Toolbar** across the top of your computer screen
Compact Phone resembles a mobile flip phone for easy dialing